

Mass Upload Tool

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Introduction


Purpose

This document will outline how to use the **Assets Mass Update** function to update a single field across multiple assets along with how to properly document the process. This process begins when a school contacts FAR with the request. The file can be uploaded only after FAR approves the new file.

Preparing for Upload

Staging the Files

1. On your local PC, create a new Folder with the following naming convention: **Mass Updates [YYYY-MM-DD] [Tub]**.

Name	Date modified	Type	Size
 Mass Updates 2021-06-07 FAS	7/13/2021 1:20 PM	File folder	

2. Save the school provided **Mass Update Tool Template** to your new **Mass Updates [YYYY-MM-DD] [Tub]** folder.
3. Navigate into the **Mass Update Tool Template** file.
4. Copy the tab with the data we that will be updated into a new worksheet.

Instructions & Notes	1_Asset Key Org	2_Description	3_Inventoriable	4_Manufacturer	5_Model N ...
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5. In your new worksheet, remove all headers.
6. Save the file, to your **Mass Updates [YYYY-MM-DD] [Tub]** folder, with the following naming convention.

MassUpdate_[a]_[b]_[c]_[d]

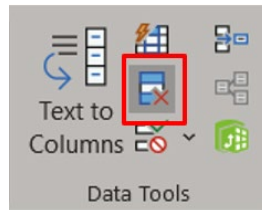
Replace the letters and brackets with the correlating information listed below.

- [a]** The field that will be updated.
- [b]** The name of tub that is requesting the Mass Upload.
- [c]** The number of asset's being updated, this is also the number of filled rows in this file.
- [d]** The date in YYYYMMDD format.

- i** The first column will store the Asset Number, it can be in either text or number format.
- i** The second column will store the updated data.

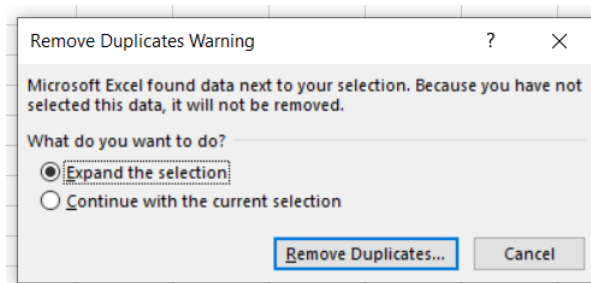
Identifying Duplicate Data

1. Copy all the data from the **MassUpdate_** file.
2. Open a new blank workbook and paste the copied data.
3. In the new workbook, highlight **column A**.
4. To reach the **Remove Duplicates** function by **mouse**:
 - a. In the header, find and then select the **Data** tab.
 - b. In the **Data** tab, find the **Data Tools** section.
 - c. Select the **Remove Duplicates** icon.

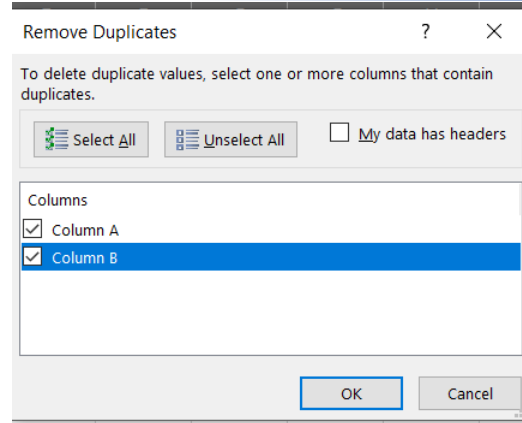


To reach the **Remove Duplicates** function by **keyboard**:

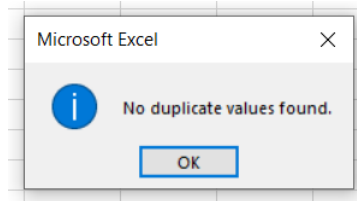
- a. Select the **Alt** key.
 - b. Select the **A** key.
 - c. Select the **M** key.
5. Select **Remove Duplicates**.



6. Select **OK**.



7. You should receive a notification stating, “No duplicate values found.”



8. If duplicates were not found, close the new workbook without saving.
 9. If duplicates were found, make note of the duplicate asset(s) and inform FAR.
- i** Until you are provided with an updated file you cannot move on with the **Assets Mass Upload** function.

Preparing to Verify Upload Results

1. For each tub with assets in this Mass Upload.
 - a. Run an *HU Asset Workbench Detail Report - Central* request
 - b. View the output of the request.
 - c. Save the output to your **Mass Updates [YYYY-MM-DD] [Tub]** folder with this naming convention, **[Tub-Segment]_AWB_RPT_Before_[YYYYMMDD]**.

2. Navigate to [FA Mass Update Tool](#).

3. Locate and download the .xlsx file titled, "Mass Update Tool - Template Results Verified"

4. Add the, "Results Verified," file to the **Mass Updates [YYYY-MM-DD] [Tub]** folder created in step 1 of [Staging the Files](#).

5. Rename the, "Results Verified," file using the following naming convention.

157 MassUpdate Inventoriable FAS 17 20210607 Results Verified
[tub-segment] MassUpdate [a] [b] [c] [d] Results Verified

Replace the letters and brackets with the correlating information listed below.

[a] The field that will be updated.

[b] The name of tub that is requesting the Mass Upload.

[c] The number of asset's being updated.

[d] The date in YYYYMMDD format.

6. Open the, "Results Verified," file.

i This file is used to compare the results of the Asset Workbench Reports downloaded before and after this file upload. There should be two sheets in this file, Comparison and V-Lookups.

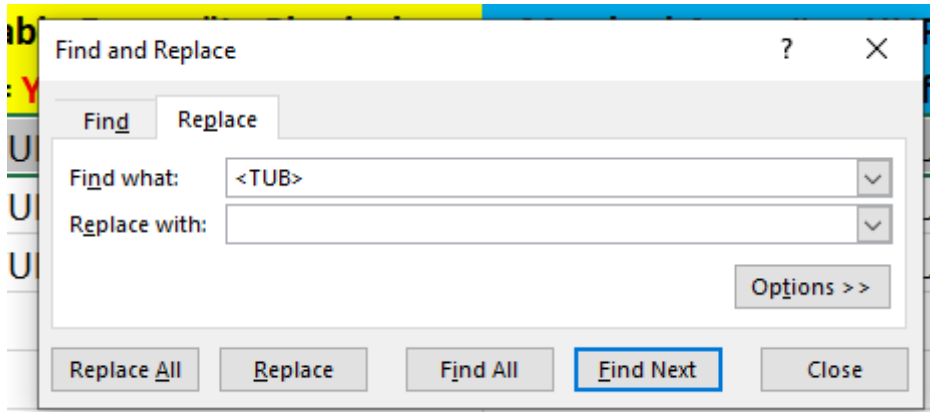
i The formulas need to be adjusted to reference the current upload. At this point it is important to take note of which tubs (if multiple) hold assets that will be affected by this upload.

7. Navigate to the V-Lookups sheet to update the template formulas.

8. Copy line 2 of the V-Lookups sheet as many times as there are tubs that own assets that are being updated. *In this example there are 3 tub: 340, 355, and 370.*

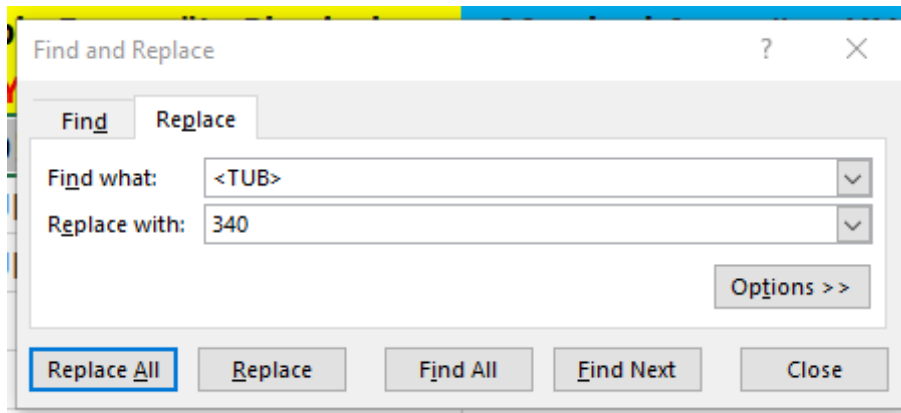
9. Select row 2 and find the phrase: <TUB>

10. Once the Find and Replace window is open, select the Replace tab.

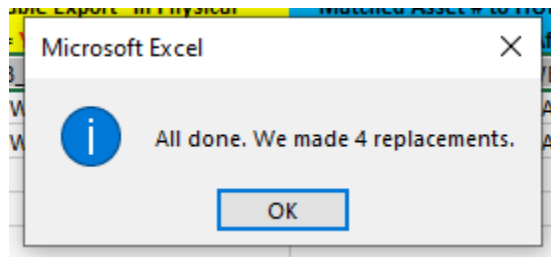


11. Enter the tub segment in the **Replace with** Field.

12. Select **Replace All**.



13. A notification will inform you that 4 replacements have been made.



15. Repeat Steps 10-14 for the subsequent rows/tubs.

	A	B	C
1	Matched Asset # to HUFA Asset Inventory Report (Before)?	Matched Asset # to Table Export "In Physical Inventory" = YES (Before)	Matched Asset # to HUFA Asset Inventory Rep (After)?
2	=VLOOKUP(\$A2,Before_340!B2:AZ324,1,0)	=VLOOKUP(\$A2,Before_340!B2:AZ324,51,0)	=VLOOKUP(\$A2,After_340!B2:\$AZ\$324,1,0)
3	=VLOOKUP(\$A2,Before_355!B2:AZ324,1,0)	=VLOOKUP(\$A2,Before_355!B2:AZ324,51,0)	=VLOOKUP(\$A2,After_355!B2:\$AZ\$324,1,0)
4	=VLOOKUP(\$A2,Before_370!B2:AZ324,1,0)	=VLOOKUP(\$A2,Before_370!B2:AZ324,51,0)	=VLOOKUP(\$A2,After_370!B2:\$AZ\$324,1,0)

16. Save the file.

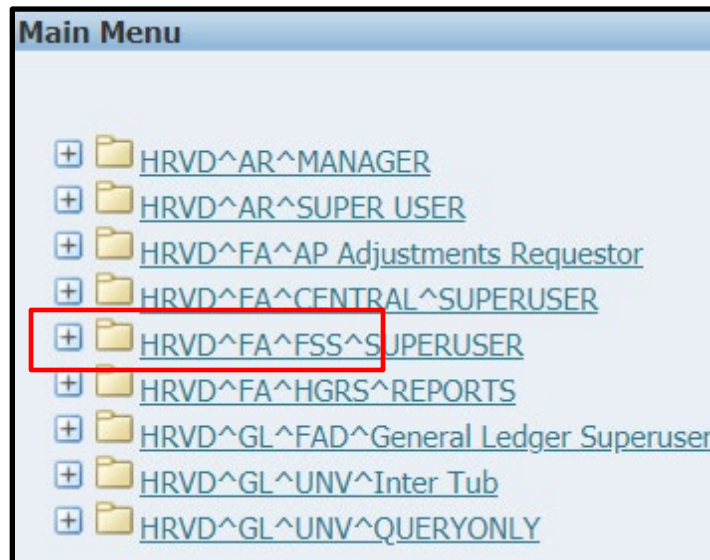
The Assets Mass Update Function

- i** Before making changes in Prod, FAR must approve the changes. The school hands over a filled-in **Mass Update Tool Template**, this is the file that will be uploaded into the **Assets Mass Update** function. FAR then clears the changes for upload so the process may begin.

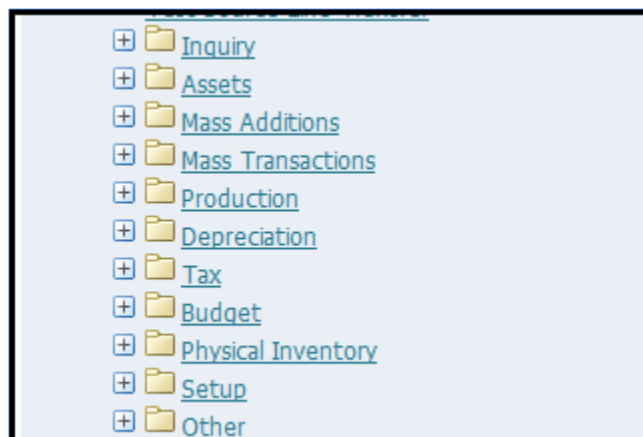
Logging In

Access Fixed Assets through the Oracle Gateway

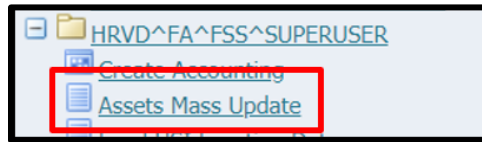
1. To access the **Oracle Gateway** go to <https://huit.harvard.edu/finance>.
2. Select the “**Oracle System Applications, Personal Homepage**” link under **ORACLE FINANCIAL GATEWAY**.
3. Log in with your Harvard Key. The **Oracle Homepage** will open.
4. From the **Homepage**, select your **Fixed Asset** responsibility, which will begin as HRVD^FA^



- i** A series of folders will open beneath the **Fixed Assets** responsibility.



5. Select the **Assets Mass Update** function. This will open the form within the application.



- i** A reminder that the FA module uses Java Web Start. For more information about Java Web Start, find the [Oracle Java Web Start Instructions](#).

Uploading the file

1. Now that you've launched Fixed Assets, the Assets Mass Update tool will appear.

The screenshot shows the Oracle Assets Mass Update tool interface. The header is blue with the text "ORACLE Assets Mass Update". Below the header is a white area with the word "Browse" in the top left. The main area contains several input fields: "Batch name" with a red asterisk, "Update Column" with a red asterisk and a dropdown arrow, "Batch Comments" with a large text area, and "File" with a red asterisk, a "Choose File" button, and the text "No file chosen". At the bottom of the form are three blue buttons: "Load", "Reset", and "View/Process Batches". Below these buttons is a white box with the text "Actions" and a downward arrow.

2. Enter your file's name in the **Batch name** field.

Batch name * MASSUPDATE_INVENTORIALBLE_FAS_17

3. Using the drop-down, select the column that the file will be updating in the **Update Column** field.

Update Column * INVENTORIALBLE

4. Enter any comments pertinent to the upload, if any.
5. Select **Choose File** and open the **MassUpdate_** file.

File * Choose File MassUpdat...0210611.xlsx

- i** At this step, the user can close the program and come back to the upload at a later point if they desired. The data is saved after a file is added in the step above.

7. Select **Load** to preview the changes to be made.

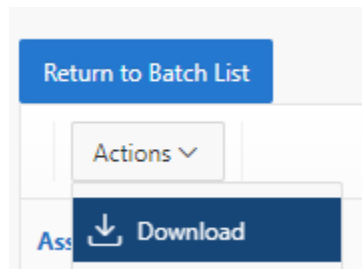
Asset number	Update column	Old value	New value	Update status	Update comments
85284	INVENTORIABLE	YES	NO	N	-
85261	INVENTORIABLE	YES	NO	N	-

8. Select **Process** to continue with the upload

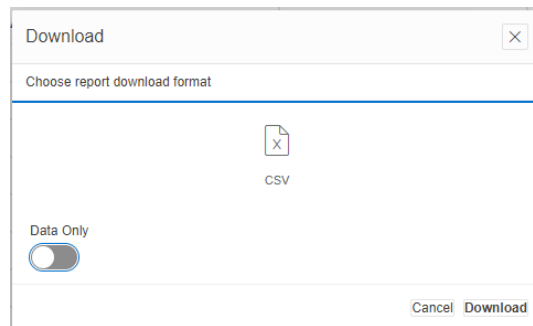
9. Select **Process Batch** to submit the upload.

10. Select the **actions** menu.

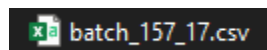
11. Select **download** from the **actions** menu to download the csv results of your upload.



12. A download pop-up will appear, select **Download** in the pop-up's bottom right corner.



13. Rename the downloaded file to **batch [tub segment] [lines being updated]**



14. Move the file into your **Mass_Updates** folder.

15. At this point you may exit oracle.

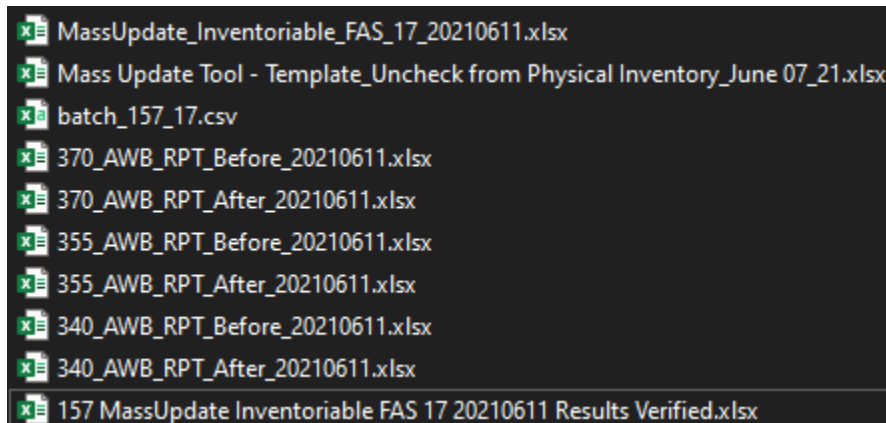
Verifying the Upload Results

1. For each tub with assets in this Mass Upload.

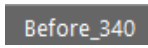
- a. Run an *HU Asset Workbench Detail Report - Central* request
- b. View the output of the request.
- c. Save the output to your **Mass Updates [YYYY-MM-DD] [Tub]** folder with this naming convention, **[Tub-Segment]_AWB_RPT_After_[YYYYMMDD]**.

i Your **Mass Updates [YYYY-MM-DD] [Tub]** folder should now contain the following files. The number of Asset Workbench reports may be different, as this depends on the number of tubs updating assets in the upload.

- d. 1 original/template file
- e. 1 *MassUpdate_* file.
- f. 3 *Asset Work Bench Reports* that were performed *before* uploading the file.
- g. 3 *Asset Work Bench Reports* that were performed *after* uploading the file.
- h. 1 *Results Verified* file.
- i. 1 *batch* file

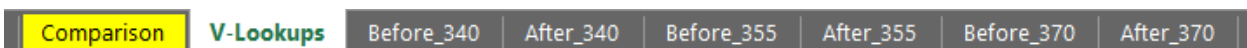


2. Open each report workbook and rename all sheet1's to **[before/after]_[tub-segment]**. For example, the report for tub 340 that was run earlier in this example would be renamed "Before_340"



3. Move each of the renamed sheets to the Results Verified workbook.

i Your Results Verified Workbook should now have a corresponding sheet for each report that was run.



4. Open your downloaded batch file.

5. Copy all but line 1 of the downloaded batch file.

	A	B	C	D	E
1	Asset Num	Old Value	New Value	Update St	Update Cor
2	85284	YES	NO	P	Update Suc
3	85261	YES	NO	P	Update Suc
4	87602	YES	NO	P	Update Suc
5	87605	YES	NO	P	Update Suc
6	87606	YES	NO	P	Update Suc
7	84052	YES	NO	P	Update Suc
8	81889	YES	NO	P	Update Suc
9	87749	YES	NO	P	Update Suc
10	82937	YES	NO	P	Update Suc
11	82938	YES	NO	P	Update Suc
12	84031	YES	NO	P	Update Suc
13	84033	YES	NO	P	Update Suc
14	84034	YES	NO	P	Update Suc
15	85222	YES	NO	P	Update Suc
16	84081	YES	NO	P	Update Suc
17	84053	YES	NO	P	Update Suc
18	84054	YES	NO	P	Update Suc

6. Open the **Comparison** sheet of your **MassUpdate** workbook.

7. Starting in cell A2, paste the copied data.

i You may exit the downloaded batch file.

8. Return to the Verified Results workbook and select the V-Lookups sheet.

9. Select a row and copy the cells.

Matched Asset # to HUFA Asset Inventory Report (Before)?	Matched Asset # to Table Export "In Physical Inventory" = YES (Before)	Matched Asset # to HUFA Asset Inventory Report (After)?	Matched Asset # to Table Export "In Inventory" = NO (After)
=VLOOKUP(\$A2,Before_340!B2:AZ324,1,0)	=VLOOKUP(\$A2,Before_340!B2:AZ324,51,0)	=VLOOKUP(\$A2,After_340!B2:AZ324,1,0)	=VLOOKUP(\$A2,After_340!B2:AZ324,51,0)
=VLOOKUP(\$A2,Before_355!B2:AZ324,1,0)	=VLOOKUP(\$A2,Before_355!B2:AZ324,51,0)	=VLOOKUP(\$A2,After_355!B2:AZ324,1,0)	=VLOOKUP(\$A2,After_355!B2:AZ324,51,0)

10. Navigate to the Comparison sheet and paste the copied cells into F2.

i The formulas have a quote in their cells to avoid slowing down the worksheet with nonfunctional formulas while they are placeholders.

'=VLOOKUP(\$A2,Before_340!B2:AZ324,1,0)

11. To activate the formulas, enter each cell and delete the apostrophe at the very beginning of each pasted cell.

=VLOOKUP(\$A2,Before_340!B2:AZ324,1,0)

i If the asset in row 2 **does belong** to the tub in the current V-Lookup, the row should look like the photo below.

Inventory Report (Before)?	(Before)	Inventory Report (After)?	(After)
85284	YES	85284	NO

i If the asset in row 2 **does not belong** to the tub in the current V-Lookup, the row should look like the photo below.

Inventory Report (Before)?	(Before)	Inventory Report (After)?	(After)
#N/A	#N/A	#N/A	#N/A

12. Select the empty cell closest to the top-left corner of the worksheet.

	E	F
1	Update Comments	Matched Asset # to HUFA Asset Inventory Report (Before)?
2	Update Successful	85284
3	Update Successful	

13. Click and drag the circle found at the bottom right corner of the cell through to the last asset.

	E	F	G	H	I
		Matched Asset # to HUFA Asset Inventory Report (Before)?	Matched Asset # to Table Export "In Physical Inventory" = YES (Before)	Matched Asset # to HUFA Asset Inventory Report (After)?	Matched Asset # to Table Export "In Physical Inventory" = NO (After)
1	Update Comments				
2	Update Successful	85284	YES	85284	NO
3	Update Successful				
4	Update Successful				
5	Update Successful				
6	Update Successful				
7	Update Successful				
8	Update Successful				
9	Update Successful				
10	Update Successful				
11	Update Successful				
12	Update Successful				
13	Update Successful				
14	Update Successful				
15	Update Successful				
16	Update Successful				
17	Update Successful				
18	Update Successful				

i The formula from has now been auto-filled for the remaining assets.

	E	F	G	H	I
		Matched Asset # to HUFA Asset Inventory Report (Before)?	Matched Asset # to Table Export "In Physical Inventory" = YES (Before)	Matched Asset # to HUFA Asset Inventory Report (After)?	Matched Asset # to Table Export "In Physical Inventory" = NO (After)
1	Update Comments				
2	Update Successful	85284	YES	85284	NO
3	Update Successful	#N/A			
4	Update Successful	#N/A			
5	Update Successful	#N/A			
6	Update Successful	#N/A			
7	Update Successful	#N/A			
8	Update Successful	#N/A			
9	Update Successful	#N/A			
10	Update Successful	#N/A			
11	Update Successful	#N/A			
12	Update Successful	#N/A			
13	Update Successful	#N/A			
14	Update Successful	#N/A			
15	Update Successful	#N/A			
16	Update Successful	#N/A			
17	Update Successful	#N/A			
18	Update Successful	#N/A			

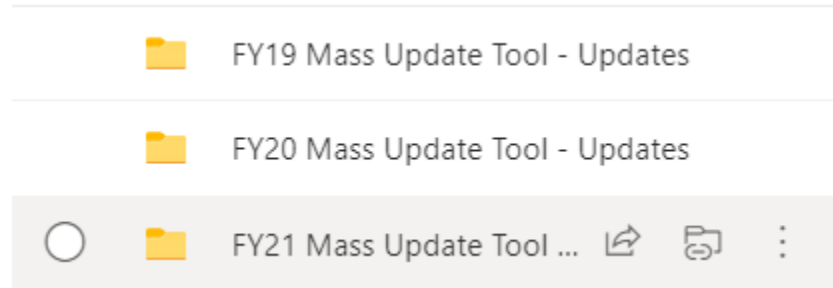
i To avoid overriding the formula matches found in rows 3-6, in this example, the third formula was copied twice and dragged (to auto-fill) once. Below is the completed verification.

	B	C	D	E	F	G	H	I	J
1	Old Value	New Value	Update Status	Update Comments	Matched Asset # to HUFA Asset Inventory Report (Before)?	Matched Asset # to Table Export "In Physical Inventory" = YES (Before)	Matched Asset # to HUFA Asset Inventory Report (After)?	Matched Asset # to Table Export "In Physical Inventory" = NO (After)	Verification Status
2	YES	NO	P	Update Successful	85284	YES	85284	NO	PASSED
3	YES	NO	P	Update Successful	85261	YES	85261	NO	PASSED
4	YES	NO	P	Update Successful	85261	YES	85261	NO	PASSED
5	YES	NO	P	Update Successful	87602	YES	87602	NO	PASSED
6	YES	NO	P	Update Successful	87605	YES	87605	NO	PASSED
7	YES	NO	P	Update Successful	87606	YES	87606	NO	PASSED
8	YES	NO	P	Update Successful	84052	YES	84052	NO	PASSED
9	YES	NO	P	Update Successful	81889	YES	81889	NO	PASSED
10	YES	NO	P	Update Successful	87749	YES	87749	NO	PASSED
11	YES	NO	P	Update Successful	82937	YES	82937	NO	PASSED
12	YES	NO	P	Update Successful	82938	YES	82938	NO	PASSED
13	YES	NO	P	Update Successful	84033	YES	84033	NO	PASSED
14	YES	NO	P	Update Successful	84033	YES	84033	NO	PASSED
15	YES	NO	P	Update Successful	84034	YES	84034	NO	PASSED
16	YES	NO	P	Update Successful	85222	YES	85222	NO	PASSED
17	YES	NO	P	Update Successful	84081	YES	84081	NO	PASSED
18	YES	NO	P	Update Successful	84053	YES	84053	NO	PASSED

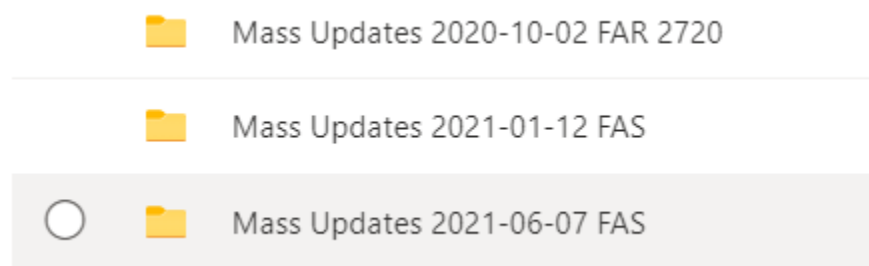
16. Confirm that all cells in column J now state "PASSED" and save the file.

Moving the Folder to Sharepoint

1. Navigate to [FA Mass Update Tool](#).
2. Open the folder for the current fiscal year.



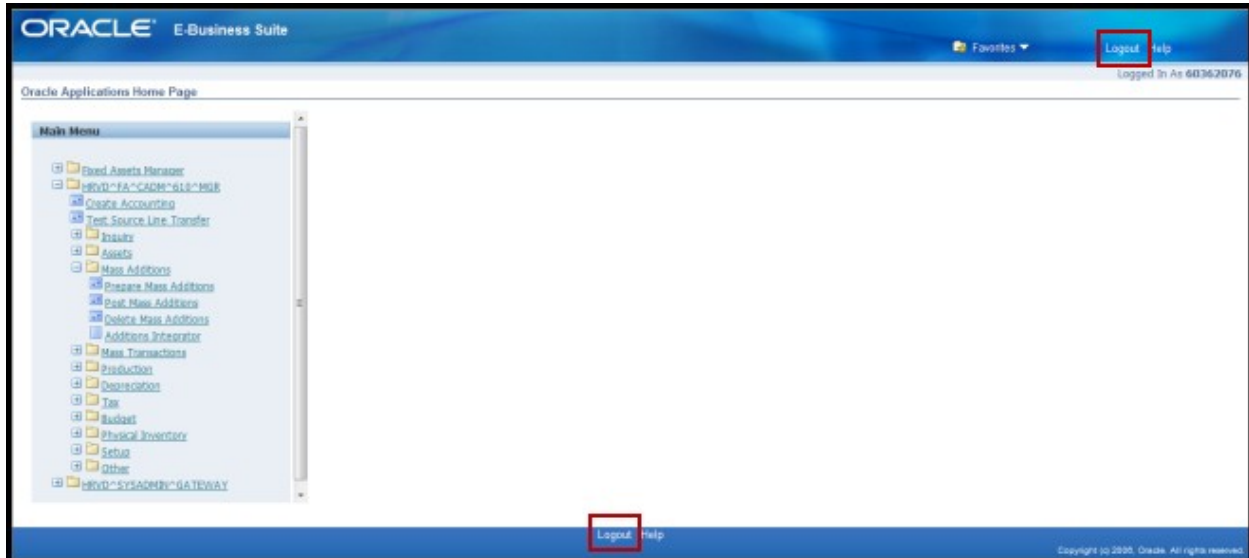
3. Move your **Mass Updates [YYYY-MM-DD] [Tub]** folder into the current sharepoint folder.



Exiting the Module

Once you have completed your transaction(s) follow these steps to exit **Oracle Fixed Assets**.

To **exit out of Oracle completely**, return to the Oracle Homepage and select **Logout** from the top right corner or bottom middle.



Questions?

If you have any questions, please contact the HUIT Support Center at 617-495-7777, or via email at ithelp@harvard.edu.